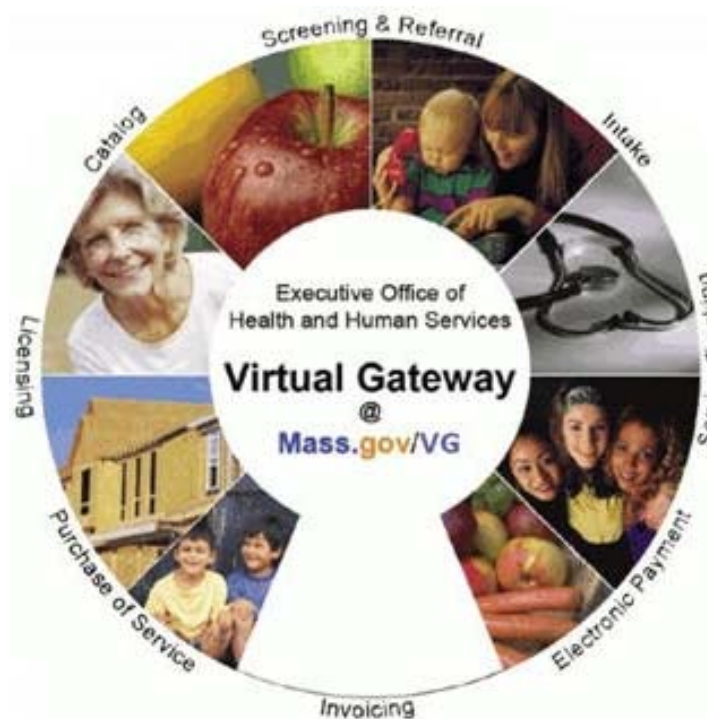


Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway



Enterprise Service Management
Provider ESM Manual
July 2008





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Chapter 1: Getting Started

Introduction

Enterprise Invoice Management/Enterprise System Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers and is one of the many services offered through the Virtual Gateway. Use of specific EIM/ESM modules is discussed in later modules.

This module discusses the following topics:

- What is the Virtual Gateway
 - System Requirements
 - Accessing the Virtual Gateway
 - Accessing provider services (including EIM/ESM)
 - Password management
-

What is the Virtual Gateway?

The Virtual Gateway is a single point on the internet for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

The ultimate goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service provider staff
- Consumers

In addition to EIM/ESM the Virtual Gateway also offers:

- **Catalog:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
 - **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
 - **Common Intake:** A single, online data collection tool for registered providers to create applications for multiple programs and services.
-



What is the Virtual Gateway?

(continued)

- **Transitional Assistance Gateway:** An online inquiry tool for registered agencies to view secure case management information for various transitional assistance programs, including Food Stamps, financial assistance, and homeless services (login required).
- **Provider Data Management:** An online service that gives *Purchase of Service (POS)* providers a single place to view, upload and edit information commonly requested by Health and Human Services agencies. The service also provides EOHHS agencies with a single place to view provider information (login required).
- **Service and Transition Planning:** An online tool for registered EOHHS staff and providers to support collaborative treatment planning and referral services for certain clients served by EOHHS (login required).
- **IRIS Services for Deaf and Hard of Hearing Consumers:** An online service for providers to request ASL interpreter or CART services on behalf of consumers; for ASL interpreters and CART reporters to post availability schedules, review and apply for open jobs (login required).
- **Homeless Management Information Systems:** The *Homeless Management Information Systems (HMIS)* perform data collection to capture information about citizens who experience homelessness (login required).
- **Mental Retardation Quality Management Reporting (HCSIS):** A service for POS providers, Department of Mental Retardation (DMR) staff, human rights coordinators, and others to file clinical information and reports on incidents, medication, restraints, and investigations for DMR clients (login required).
- **Senior Information Management System (SIMS):** An online data collection, case management, and reporting tool for Executive Office of Elderly Affairs (EOEA) agencies and providers. It enables users to track various programs for elders, including intake and referral, home care, nutrition, clinical assessments, and more (login required).



System Requirements

System Requirements for EIM/ESM and the Virtual Gateway

All computers used to access the Virtual Gateway require Internet Explorer 6.0 or higher.

For the EIM/ESM application, the minimum system requirements are:

- Windows (98, 2000 or XP Business)
- Internet Explorer 6.0 or higher
- 800x600 screen resolution
- 300MHz CPU and 128MB RAM

Additionally, the preferred system features to enhance the performance of EIM/ESM are:

- Windows XP (Business Class)
- 1024x768 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Operating System
 - Mac OS X
- Browsers:
 - Safari (Mac)
 - Firefox
 - Netscape

Note: Testing on the EIM/ESM application has not been conducted on these alternative platforms therefore compatibility issues may result.

Tip: If a lower screen resolution is selected, then the user needs to select the “Smaller” text size.


1. Select the View menu from the Internet Explorer browser.
 2. Select **Text Size>>Smaller**.
-



Accessing the Virtual Gateway

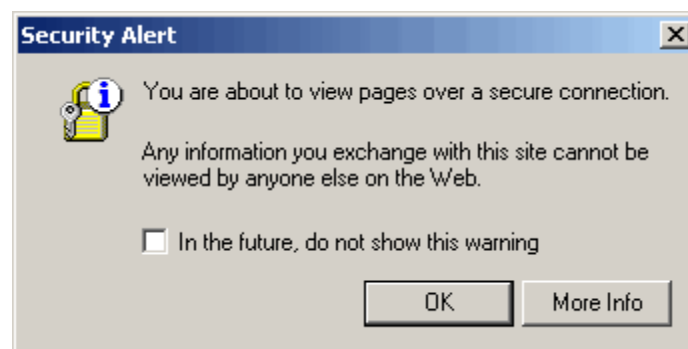
Access to EIM/ESM is through Virtual Gateway Provider Services.
To Access Provider Services:

1. Open an Internet Explorer session.
2. Type web address **mass.gov/vg** in your browser.


3. Select  from **ONLINE SERVICES** box.



Security Alert message appears.



4. Click OK.

Tip: Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application *not* your internet browser's **Back** and **Forward** () buttons.



Accessing the Virtual Gateway (continued)

You are directed to the Virtual Gateway login page.

Welcome Virtual Gateway User

Username

Password

(Case sensitive)

[Forgot password?](#)

Virtual Gateway Customer Service
Monday through Friday, 8:30 am to 5 pm
800-421-0938

Note: Security requires that each person have a Virtual Gateway username and password.

The following steps guide you through logging into the Virtual Gateway:

1. Enter your **Username** and **Password**.

Note: If you are an existing user, enter your current password. If you are a new user, enter the temporary password you received from your new user email.

2. Click the **[Submit]** button. *The **Change Password** page appears.*

Note: The first time you access the Virtual Gateway under this policy; you will be prompted to change your password. Please read and follow the password requirements on the Change Password page to successfully change your password.

To change your password:

3. Enter and confirm your new password in required fields.

Click the **[Change Password]** button.

Home Change Password Account Attributes Authentication Questions

Change Password

Welcome to the Virtual Gateway. Our system indicates that your password has expired. For security reasons, it is required that you change your password. To change your password enter your new password twice and then click Change Password. Please make sure to choose a password that conforms to the policy below. If you have difficulty in changing your password, you may contact the Virtual Gateway Customer Service at (800) 421-0938.

Password

Confirm Password

In order to successfully change your password, it must adhere to the following minimum password requirements:

- Must contain between 8 and 16 characters
- Must contain 1 uppercase character(A, B, C) and 1 lowercase character(a, b, c) with no more than 2 characters repeating in order (i.e. aa is allowed, aaa is not)
- Must contain a number or numbers with no more than 2 characters in sequential order (i.e. 12 is allowed, 123 is not)
- Cannot use the same letter more than 3 times
- Cannot contain the words "test", "password" or the word "pass", any part of your accountID, your email, your first name, your last name, or your full name
- Cannot contain the following special characters: * , / ; < > ' - ? [\]

* Indicates a required field



Accessing the Virtual Gateway Services

(continued)

The Virtual Gateway Terms and Conditions of Use page appears.

4. Read the Terms and Conditions of Use.
5. Click the [**Agree**] button to continue.

Note: Users are required to agree to the Virtual Gateway Terms and Conditions of Use upon first login.

A screenshot of a web browser showing the "Virtual Gateway Terms and Conditions of Use" page. The page has a navigation bar at the top with links: Home, Change Password, Account Attributes, and Authentication Questions. Below the navigation bar, the title "Virtual Gateway Terms and Conditions of Use" is displayed. A message states: "You must accept the below agreement to be able to use online services offered by EOHHS". A text box contains the following text: "User hereby acknowledges that these Terms and Conditions represent the entire understanding between User and EOHHS concerning use of the Virtual Gateway." At the bottom of the text box, there are two buttons: "Agree" (highlighted with a red box) and "Disagree".

The Authentication Questions page appears.

A screenshot of a web browser showing the "Authentication Questions" page. The page has a navigation bar at the top with links: Home, Change Password, Account Attributes, and Authentication Questions. Below the navigation bar, the title "Authentication Questions" is displayed. A message states: "Welcome to the Virtual Gateway. Our security system requires you to complete the following questions, so that you can manage your account." Below this, a message says: "Please answer all of the questions below and then click Save." There is a checkbox labeled "For Login Interface" which is checked. To the right of the checkbox, the word "Default" is displayed. Below this, there is a table with two columns: "Question" and "Answer". The first row of the table has the question "What is your favorite book?" in the "Question" column and an empty text box in the "Answer" column.

As part of the login process, you must complete all of the security authentication questions that display on this page.

Complete the following steps to submit answers to your security questions:

6. Answer all of the security questions.
7. Click the [**Save**] button to save your responses.

*The **Business Services** page displays providing you to access your specific business service.*



**Accessing the
Virtual
Gateway
Services**
(continued)

Notes and tips:

- Any time you change your password or call Virtual Gateway Customer Service with a password question, you will need to answer three of the seven authentication questions as verification. Questions are chosen at random. Answers to security questions are not case sensitive.
 - Use passwords you are likely to remember, and be sure to not post it where others can access it.
 - If you feel your password has been compromised, change your password.
 - If you receive the error message “Invalid User name & Password. Please Try Again,” call Virtual Gateway Customer Service for Assistance.
 - You cannot reuse the same password.
-



Password Management

After your initial login, you can change your password at any time by clicking on the [Manage My Profile](#) link.

After logging in the first time, and at regular intervals afterward, users are required to change their password. There are several requirements for your new password:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway Customer Service. All users must change their password at first login.
- Must contain between 8 and 16 characters
- The password must contain 1 uppercase character (A,B,C) and 1 lowercase character (a,b,c) with no more than 2 characters repeating in order (i.e. aa is allowed, aaa is not).
- Must contain a number or numbers with no more than 2 characters in sequential order (i.e. 12 is allowed, 123 is not).
- Cannot use the same letter more than 3 times.
- Cannot contain the words “test”, “password” or the word “pass”, any part of your account ID, your email, your whole first name, your whole last name, or your full name.
- Cannot contain the following special characters: * + , / : ; < = > ‘ - ? [\] |
- Passwords are case-sensitive.
- Users will be automatically logged out of the system after 30 minutes of inactivity.
- EIM/ESM after 15 minutes of inactivity.

Important: You will need to disable any pop-up blocker in your browser to allow the change of password screen to appear. Contact your network administrator if you need assistance with this process.



Maintaining Account Information

Periodically, you will be prompted to change your password. As the expiration date for your password approaches, you will receive a message when you login to your account that your password will be expiring soon.

Complete the following steps to change your password before the expiration date:

1. Log into the Gateway. The Business Services page will display.
2. Click **Manage My Profile** link in the [Account Management] section on the right hand side of the page.
3. Click **Change Password** tab.
4. Enter and confirm your new password.
5. Click [Change Password] button.

Complete the following steps if you forget your password:

1. From the login page, click the [Forgot Password?](#) link.
 2. Enter your username and click the [Submit] button.
 3. Verify the answers to the security questions.
You will be prompted to change you password.
 4. Click the [Login] button.
 5. Enter Password and Confirm Password.
 6. Click the [Change] button.
-

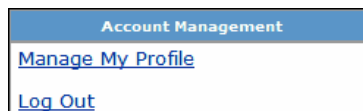


Maintaining Account Information

If you would like to change other account information for your Virtual Gateway user ID, this can be done from the Account Maintenance page.

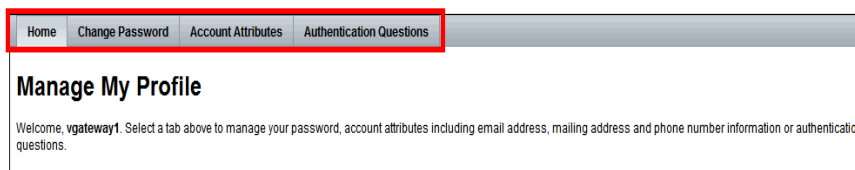
Complete the following steps to manage or change your account information:

1. Once logged in to the Gateway on the Business Services page, look for the **[Account Management]** section on the right hand side of the page.
2. Click the [Manage My Profile](#) link.



*The **Manage My Profile** page appears.*

3. Select the appropriate tab located at the top of the page to change your account information. Follow all instructions provided.



Virtual Gateway Customer Service Information

The Virtual Gateway Customer Service is available to assist with:

- General questions regarding the Virtual Gateway
- Technical questions or system issues
- Questions regarding how to use EIM/ESM
- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address
- Module/page/field you were working on (if applicable)
- Description of the issue or error message
- Perceived criticality

You can reach the Virtual Gateway Customer Service at 1-(800)-421-0938 from 8:30 a.m. to 5 p.m. Please leave a message if calling after hours.



Chapter 2: Introduction to EIM/ESM

Introduction

The EIM/ESM service provides functionality for a variety of provider and agency users. These functions are presented as modules within EIM/ESM. Modules that are required to complete day-to-day responsibilities are covered in this user manual. Users have access to their required modules when logged into EIM/ESM. Other modules will not be accessible.

The EIM/ESM service is available seven days a week from 7 a.m. to 1 a.m. Thursday – Tuesday; 7 a.m. to 7 p.m. Wednesday.

Each module in the EIM/ESM service has a corresponding module in one of the EIM/ESM user manuals. This module discusses the following topics:

- What is EIM/ESM?
- EIM/ESM Overviews
- Benefits of EIM/ESM

What is EIM/ESM?

Enterprise Invoice Management/Enterprise Service Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers.

Enterprise Invoice Management (EIM) is an EOHHS-wide invoicing and service delivery reporting tool which coordinates invoicing and reporting across POS programs, agencies, and providers.

Enterprise Service Management (ESM) supports providers contracted through the Department of Public Health (DPH) with a client management and service tracking tool. ESM fully integrates and coordinates delivery and administration of care across DPH programs, bureaus, and providers.

This manual focuses on billing functionalities available in EIM. Additional information about EIM/ESM can be found under the Provider tab of the EOHHS web page: www.mass.gov/vg.



EIM Overview

EIM (Enterprise Invoice Management) enables provider organizations to invoice or bill EOHHS agencies for certain Purchase of Service (POS) contracted services.

Service Delivery Reports (SDRs):

- Are generated and submitted by providers through EIM
- Are automatically adjudicated within EIM
- Adjudication results can be viewed in EIM

PRC (Payment Request for Commodity):

- Are generated within EIM
- Can be tracked through EIM

ESM Overview

ESM (Enterprise Service Management) enables provider organizations to maintain their client roster, program enrollments, service plans, case management plans, and encounter documentation.

Client Management:

- Accepts electronic applications
- Maintains client information

Service Management:

- Determines eligibility
- Enrolls clients
- Manages authorizations
- Enables service planning and tracking

Note: Initially, ESM will be deployed for DPH programs only.



Benefits of EIM/ESM

How does the EIM/ESM service benefit providers?

- **Simplifies** reporting and invoicing for purchased services
- **Enables** providers to track invoices through the adjudication and payment process, providing information about status, adjustments, date of payment, etc.
- **Provides** unprecedented enterprise reporting capabilities to provider organizations as well as agencies

What are the benefits of EIM?

- Provides expedited payment
- Provides real-time payment processing
- Offers access to up-to-date financial data

What are the benefits of ESM?

- Provides access to dynamic data collection and reporting
 - Provides online, client-based enrollment
 - Enhances referral throughout treatment episode
-





Chapter 3: EIM/ESM Navigation Basics

Introduction

Navigation is simple and consistent throughout each module in EIM/ESM. The topics in this module will help you:

- Understand the modular structure of EIM/ESM
- Navigate through each module
- Search for records
- Identify additional navigational tools

Module Links

When a user logs into EIM/ESM, the **module links** are immediately available at the top of the page.

The screenshot shows the EIM/ESM user interface. At the top, there is a navigation bar with the following links: Home, Clients, Case Management, Billing, Contracts, Report, Help, and Logout. The current location is indicated as 'Steps > Administrator Home'. The main content area displays a 'Welcome atest1' message, followed by an 'Alerts' section with a table showing a message dated 01/29/2007: 'This environment is for training only!'. Below the alerts, there are sections for 'Tasks' and 'Appointments', both indicating 'No Tasks Exist.' and 'No Appointments Exist.' respectively. At the bottom, there is a section for 'EIM/ESM USER CERTIFICATION' with a disclaimer and two sections for 'FOR AGENCY USERS' and 'FOR PROVIDER USERS'.

Each **module link** corresponds with a functional area: the **Clients** module provides access to eligibility and enrollment functions, the **Report** module provides access to reports. **Billing** module provides access to billing, etc.

Clicking a module link directs you to the corresponding features.

Home Clients Case Management Authorizations Billing Contracts Credentials Administration Report



The Navigation Bar

When a module is selected, a corresponding **navigation bar** appears on the left side of the page, allowing users to navigate to related functions.

A screenshot of a web application interface. At the top, there is a horizontal navigation bar with tabs: Home, Clients, Case Management, Billing, Contracts, Report, Help, and Logout. The 'Clients' tab is selected and highlighted with a red circle. Below this, a breadcrumb trail reads 'Current Location: Home > Client Search'. On the left side, there is a vertical navigation bar with a 'Client' header and a list of links: 'Client Search' (highlighted with a red box), 'Advanced Client Search', 'Case Search', 'Cross Activity Eligibility', and 'Applicant Search'. The main content area is titled 'Client Search' and contains a red error message: 'At least one search criteria must be entered'. Below the message are input fields for 'Last Name', 'First Name', 'ID', 'ID Type' (a dropdown menu with 'Select Below' selected), and 'Date of Birth'. A 'Search' button is located at the bottom right of the form.

The default page—the page that displays first when a module is selected—varies by module, but is typically a search page.



Searching for Records

Searching for a record is the first step in most EIM/ESM functions. Users search for clients, invoices, contracts, etc., depending on the functions they use.

Home | Clients | Case Management | Billing | Contracts | Report | Help | Logout |
Current Location: Client > Client Search

Client Search

At least one search criteria must be entered

Last Name: First Name:

ID:

ID Type:

Date of Birth:

Users search by entering a value or wild card search in a criteria field.

The wild card is **%**. It can be used in alpha-numeric fields alone or with other characters:

If the criteria is...	The results will be...
%son	Thompson, Johnson, Mason
m%n	Man, Mason, Mellon

The **%** can be used alone to return all records; however, the response time will be slower.

Tip: To narrow the search results, populate as many search criteria fields as possible (for example last name, birth date etc.)

To search:

1. Enter criteria.
2. Click .

The search results appear.

Search Results

Search results appear in a table with a link to access the record.

Search Results								
Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
Sample	Carl	001349999	SSN	06/21/1949	Homeless	Springfield	EOHHS REGION 1: WESTERN MASS	MA

| Display 1 to 1 of 1 |

Click the [linked field](#) to select and view the record.



Additional Navigational Tools


You can use the following tools to navigate through EIM/ESM.

Breadcrumbs

Breadcrumbs at the top of each page allow the user to navigate to previous pages easily.

Current Location: [Client](#) > [Client Search](#) > [Face Sheet](#) > [Client Summary](#)

In the above example, the current page displayed is **Client Summary**. To return to the Client Search page, simply click

[Client Search](#) > . Do not use the browser  button.

Hyperlinks

Clicking these links (blue underline) allows you to open the record or page related to client information.

Action Buttons

These buttons are used to inform the system to perform a function such as saving data, opening a new page, or performing a search.



Page Characteristics

The look and feel of EIM/ESM is intended to be user-friendly.

The following table contains page characteristics with a graphic sample.

Required Fields

Required fields are identified on each page with a red asterisk (*) to the left of the field name. These fields must be entered before the system can perform an action such as save new data or perform a calculation. If required fields are not populated appropriately, an error message is presented to the user.

A screenshot of a web form titled "Service Delivery Summary". It contains several input fields: "Month:" with the value "May", "Submission Date:" (empty), "SDR Type:" with the value "Supplemental", and "*Sort By:" with a dropdown menu showing "Client Name" and a "Sort" button.

Optional Fields

These are fields where policy and procedures dictate the necessity to populate the field. The system will allow these fields to remain empty.

A screenshot of a web form showing optional fields. It includes checkboxes for "*Government:" (Yes/No), "Status:" (Active/Inactive), and a text field for "*Organization Type:" with the value "Secretariat". There is also a "Comments:" text area.

Calendar Buttons

These buttons appear to the right of date fields. By clicking the calendar button the current month calendar opens. You can use your mouse to select days in the current month or navigate to other months or years by the drop down menus at the bottom.

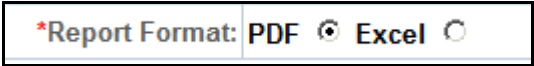
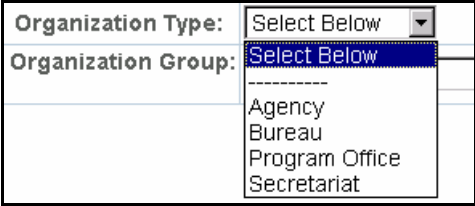
A screenshot of a calendar widget for May 2008. It shows a grid of days from Sunday to Saturday. The day "1" is highlighted in red. Navigation links "<< Prev" and "Next >>" are at the top. At the bottom, there are dropdown menus for the month (May) and year (2008), a "Go" button, and a "Close Calendar" link.



**Page
Characteristics**
(continued)

The look and feel of EIM/ESM is intended to be user-friendly.

The following table contains page characteristics with a graphic sample.

Radio Buttons These buttons allow you to make a selection when the field limits you to only one choice. Radio buttons can be selected using the mouse or up/down and left right keys.	 A screenshot of a web interface showing a label "*Report Format:" followed by two radio button options: "PDF" (which is selected) and "Excel".
Pick Lists These fields allow you to select a single choice from available options. Or you can type the first letter or number you are looking for and the system automatically directs you to the beginning letter or number you type in order.	 A screenshot of a web interface showing two pick list fields. The first is labeled "Organization Type:" and the second is labeled "Organization Group:". Both have a dropdown menu open showing a list of options: "Select Below", "Agency", "Bureau", "Program Office", and "Secretariat".



Chapter 4: Searching for a Client

Searching for Clients

To access client data you must first search for their record.

To see if a client is already in the system you must search, and match on all five data fields: first name, last name, DOB, gender and SSN. This helps avoid duplicate records.

You can use the search feature to locate records for review and enrollment.

Access Client Search Page

First, log into *ESM*.

To access the **Client Search** page:

Click the **Clients** module.

The Client Search page appears.

Tip: The **Client Search** page is the default.

The screenshot shows the ESM system interface. At the top, there is a navigation bar with links: Home, Clients, Case Management, Billing, Contracts, Credentials, Report, Help, and Logout. Below this, a breadcrumb trail reads 'Current Location: Clients > Client Search'. On the left, a sidebar menu is visible with options: Client Search, Advanced Client Search, Case Search, Cross Activity Eligibility, and Applicant Search. The main content area is titled 'Client Search' and contains several input fields: 'Last Name' (with 'Sample' entered), 'First Name', 'ID', 'ID Type' (a dropdown menu set to 'Select Below'), and 'Date of Birth'. A 'Search' button is located at the bottom right of the form.

Tips:

- To add a client, enter both a first and last name.
- The unique identifier (ID) is an alpha code only.
- To search by the client's auto-generated unique identifier, use either the first or last name field.



Search Process

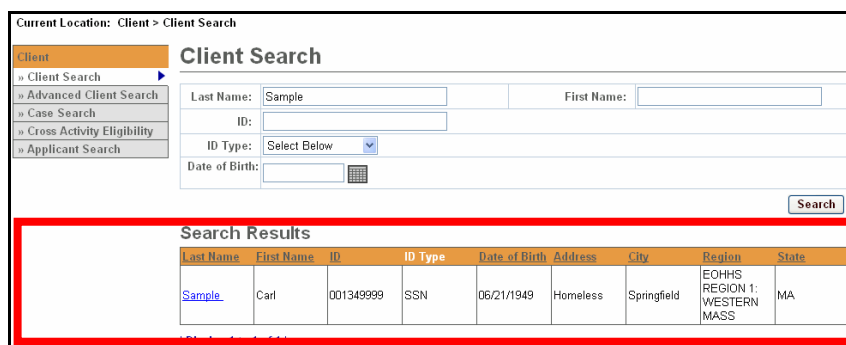
Begin at the **Client Search** page.

1. Enter search criteria.
 - You can search by partial criteria in either of the names fields (for example, **A** returns all names beginning with A)
 - You can use the **%** wild card for all fields except social security number. Using the wild card alone in a name field returns all records; however, the response time will be slower.
 - Available fields include:
 - First or last name
 - Date of birth
 - ID/ID Type

Tip: To narrow down search results, populate as many search criteria fields as possible.

2. Click 

The search results are listed below the search criteria.



The screenshot shows the 'Client Search' page. On the left is a sidebar with navigation links: 'Client' (selected), 'Client Search', 'Advanced Client Search', 'Case Search', 'Cross Activity Eligibility', and 'Applicant Search'. The main area is titled 'Client Search' and contains input fields for 'Last Name' (Sample), 'First Name', 'ID', 'ID Type' (a dropdown menu), and 'Date of Birth'. A 'Search' button is at the bottom right. Below the search fields is a 'Search Results' section, which is highlighted with a red rectangle. It contains a table with the following data:

Last Name	First Name	ID	ID Type	Date of Birth	Address	City	Region	State
Sample	Carl	001349999	SSN	06/21/1949	Homeless	Springfield	EOHHS REGION 1: WESTERN MASS	MA

3. Select the [linked field](#) from the search results.

*The **Face Sheet** page appears.*

Important: Review **Face Sheet** to check that required data fields are populated.



Face Sheet

The information displayed on the **Face Sheet** is collected during intake.

Manage Client	Client #253622 : Carl Sample																				
» Face Sheet	Application Summary																				
» Client Summary	<table border="1"><thead><tr><th>Application Number</th><th>Enrollment Status</th><th>Submission Date</th><th>Expiration Date</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td></tr></tbody></table>	Application Number	Enrollment Status	Submission Date	Expiration Date																
Application Number	Enrollment Status	Submission Date	Expiration Date																		
» Personal Info	Client Summary																				
» Referrals	<table border="1"><thead><tr><th>First Name</th><th>Middle Name</th><th>Last Name</th><th>Suffix</th><th>Type</th></tr></thead><tbody><tr><td>Carl</td><td></td><td>Sample</td><td></td><td>Primary</td></tr></tbody></table>	First Name	Middle Name	Last Name	Suffix	Type	Carl		Sample		Primary										
First Name	Middle Name	Last Name	Suffix	Type																	
Carl		Sample		Primary																	
» Relations	Personal Information																				
» Insurance	<table border="1"><tbody><tr><td>Date of Birth:</td><td>06/21/1949</td><td>Age:</td><td>57 Year(s) 8 Month(s) 27 Day(s)</td><td>Gender:</td><td>M</td></tr><tr><td>Social Security Number:</td><td>001-34-9999</td><td>Highest Grade Completed:</td><td></td><td></td><td></td></tr><tr><td colspan="6">In what language do you prefer to read or discuss health related materials? English</td></tr></tbody></table>	Date of Birth:	06/21/1949	Age:	57 Year(s) 8 Month(s) 27 Day(s)	Gender:	M	Social Security Number:	001-34-9999	Highest Grade Completed:				In what language do you prefer to read or discuss health related materials? English							
Date of Birth:	06/21/1949	Age:	57 Year(s) 8 Month(s) 27 Day(s)	Gender:	M																
Social Security Number:	001-34-9999	Highest Grade Completed:																			
In what language do you prefer to read or discuss health related materials? English																					
» Consents	Contact Information																				
» Single Activity Eligibility	<table border="1"><thead><tr><th>Address</th><th>Type</th><th>Effective From</th><th>Effective To</th><th>Restricted</th><th>Primary</th></tr></thead><tbody><tr><td>None, Springfield, MA, 01109</td><td>Homeless</td><td>03/20/2007</td><td></td><td>Yes</td><td>Yes</td></tr></tbody></table>	Address	Type	Effective From	Effective To	Restricted	Primary	None, Springfield, MA, 01109	Homeless	03/20/2007		Yes	Yes								
Address	Type	Effective From	Effective To	Restricted	Primary																
None, Springfield, MA, 01109	Homeless	03/20/2007		Yes	Yes																
» Enrollments	<table border="1"><thead><tr><th>Phone Number</th><th>Extension</th><th>Type</th><th>Effective From</th><th>Effective To</th><th>Restricted</th><th>Primary</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary													
Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary															
» Services	Primary Relation																				
	<table border="1"><thead><tr><th>First Name</th><th>Middle Name</th><th>Last Name</th><th>Type</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td></tr></tbody></table>	First Name	Middle Name	Last Name	Type																
First Name	Middle Name	Last Name	Type																		
	Personal Information																				
	<table border="1"><tbody><tr><td>Date of Birth:</td><td></td><td>Age:</td><td></td><td>Gender:</td><td></td></tr><tr><td>Social Security Number:</td><td></td><td>Highest Grade Completed:</td><td></td><td></td><td></td></tr><tr><td colspan="4">In what language do you prefer to read or discuss health related materials?</td><td>Relation Type:</td><td></td></tr></tbody></table>	Date of Birth:		Age:		Gender:		Social Security Number:		Highest Grade Completed:				In what language do you prefer to read or discuss health related materials?				Relation Type:			
Date of Birth:		Age:		Gender:																	
Social Security Number:		Highest Grade Completed:																			
In what language do you prefer to read or discuss health related materials?				Relation Type:																	
	<table border="1"><thead><tr><th>Phone Number</th><th>Extension</th><th>Type</th><th>Effective From</th><th>Effective To</th><th>Restricted</th><th>Primary</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary													
Phone Number	Extension	Type	Effective From	Effective To	Restricted	Primary															
	Household Characteristics																				
	<table border="1"><tbody><tr><td>Number of Adults:</td><td>1</td><td>Number of Children Living in Household:</td><td>0</td></tr><tr><td>Family Income:</td><td>\$50.00</td><td>Income Frequency:</td><td>Weekly</td></tr><tr><td>Employment Status:</td><td></td><td>Marital/Relationship Status:</td><td>Divorced</td></tr><tr><td>Source of Income/Support:</td><td>Other,</td><td></td><td></td></tr></tbody></table>	Number of Adults:	1	Number of Children Living in Household:	0	Family Income:	\$50.00	Income Frequency:	Weekly	Employment Status:		Marital/Relationship Status:	Divorced	Source of Income/Support:	Other,						
Number of Adults:	1	Number of Children Living in Household:	0																		
Family Income:	\$50.00	Income Frequency:	Weekly																		
Employment Status:		Marital/Relationship Status:	Divorced																		
Source of Income/Support:	Other,																				
	Insurance																				
	<table border="1"><thead><tr><th>Insurance Name</th><th>Type</th><th>Policy Number</th><th>Group Number</th><th>Effective From</th><th>Effective To</th><th>Primary</th></tr></thead><tbody><tr><td>No Insurance</td><td>Uninsured</td><td></td><td></td><td>03/20/2007</td><td></td><td>No</td></tr></tbody></table>	Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary	No Insurance	Uninsured			03/20/2007		No						
Insurance Name	Type	Policy Number	Group Number	Effective From	Effective To	Primary															
No Insurance	Uninsured			03/20/2007		No															
	Cultural Background																				
	<table border="1"><tbody><tr><td>Spanish/ Hispanic/ Latino:</td><td>No</td><td>U.S. Citizen:</td><td>Unknown</td></tr><tr><td>Ethnicity:</td><td>Russian</td><td>Date of entry in the U.S. :</td><td></td></tr><tr><td>Race:</td><td>White</td><td>Date or Year of Citizenship:</td><td></td></tr><tr><td>Country of Birth:</td><td></td><td>Number of Years a Citizen:</td><td></td></tr><tr><td>Comments:</td><td colspan="3"></td></tr></tbody></table>	Spanish/ Hispanic/ Latino:	No	U.S. Citizen:	Unknown	Ethnicity:	Russian	Date of entry in the U.S. :		Race:	White	Date or Year of Citizenship:		Country of Birth:		Number of Years a Citizen:		Comments:			
Spanish/ Hispanic/ Latino:	No	U.S. Citizen:	Unknown																		
Ethnicity:	Russian	Date of entry in the U.S. :																			
Race:	White	Date or Year of Citizenship:																			
Country of Birth:		Number of Years a Citizen:																			
Comments:																					

Tip: You cannot edit information directly within the **Face Sheet**; however, you can easily navigate to editable forms from this page by selecting the appropriate menu in the navigation bar on the left side.

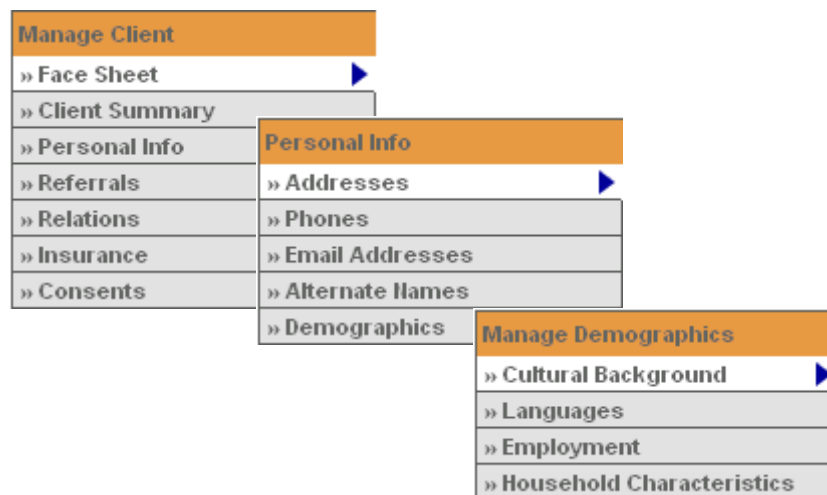


Face Sheet Information

The **Face Sheet** is a summary of all client information available in the system.

It includes:

- client summary information
- personal information
 - contact information
 - demographic information
 - household characteristics
 - cultural background
 - employment
- referrals
- relations
- insurance information
- consents





Chapter 5: Intake

Client Information Overview

Your search results will contain all clients that have completed the client summary portion of the intake process:

- With an enrollment status that has not yet been determined
- With enrollments that has expired

When managing client information you can:

- Add new information for a client
- Update existing client information from the Face Sheet

If clients are being screened for the first time, then the intake worker would be collecting and entering all information needed to make an eligibility determination for the particular program the incoming client is applying for.

Additional Information

Important Note: When needed, users should refer to program-specific forms to determine required data needed to determine eligibility. See handout to review the program-specific form for required field information.



Adding a Client

To add a client:

1. Access the **Client Search** page.
2. Search the system for the client you wish to add.

Current Location: Client > Client Search

Client	Client Search
» Client Search	
» Advanced Client Search	
» Case Search	
» Cross Activity Eligibility	
» Applicant Search	

Last Name:	Sample	First Name:	
ID:			
ID Type:	Select Below		
Date of Birth:			

[Your search did not return any results. Please add a client](#)

[Search](#)

3. If the client isn't in the system, then click [add a client](#) link.

The Add Client page appears.

Home | Clients | Case Management | Billing | Contracts | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Add Client

Client	Add Client
» Client Search	
» Advanced Client Search	
» Case Search	
» Cross Activity Eligibility	
» Applicant Search	

Prefix:	Select Below		
*First Name:	Carl	Middle Name:	
*Last Name:	Sample		
Suffix:	Select Below	Highest Grade Completed:	Select Below
*Date of Birth:	6/21/1949	Age:	System Generated
*Gender:	M-Male		
*Social Security Number:	001-34-9999	Refused	<input type="checkbox"/>
		Unknown	<input type="checkbox"/>

[Save New Client](#)

4. Enter required information.

Note: See handout to review the program-specific intake form for required field information.

5. Click [Save New Client](#).

The Client Summary page appears, with newly entered information.

Client Summary

Client Added Successfully

Tip: The system assigns a unique "Person/Client ID #".

Client #253622 : Carl Sample

Client Summary



Home | Clients | Case Management | Billing | Contracts | Credentials | Report | Help | Logout

Current Location: Client > Client Search > Face Sheet > Client Summary

Client #253622 : Carl Sample

Client Summary

Client Added Successfully

Primary Address:	
Primary Phone Number:	
Prefix: Select Below	
*First Name: Carl	Middle Name:
*Last Name: Sample	
Suffix: Select Below	Highest Grade Completed: Select Below
*Date of Birth: 06/21/1949	Age: 57 Year(s) 8 Month (s) 27 Day(s)
*Gender: M-Male	
*Social Security Number: 001-34-9999	Refused <input type="checkbox"/> Unknown <input type="checkbox"/>
Date Created: 03/20/2007 02:33:22 PM	Created By: adph
Date Changed:	Changed By:

Save Changes Delete Client

You can update client summary information by clicking **Client Summary** from the navigation bar **Save Changes**, or **Delete Client**.

Note: You can update a client's information or delete a client from the system.

Adding Client Information

To add client information for the first time you may need to enter the following information for:

1. Personal Info including:
 - a. Addresses
 - b. Phones
2. Referrals
3. Relations
4. Insurance
5. Consents

Note: The above information can also be updated at any time once entered.



Personal Info

To add personal info:

1. Access the **Applicant Face Sheet Summary** page.
2. Select **Personal Info** from the navigation bar.

*The **Addresses** page appears.*



Adding Address Information

The screenshot shows a web interface with a sidebar menu containing 'Addresses', 'Phones', 'Email Addresses', 'Alternate Names', and 'Demographics'. The main content area is titled 'Addresses' and displays the message: 'No Address Information found. You may add a new Address.'

- Click the [add a new Address](#) link.

The Add Address page appears.

The screenshot shows the 'Add Address' form for Client #253622 : Carl Sample. The form includes fields for Address Type (Homeless), Address Line 1, Address Line 2, State (MA), City (Springfield), Postal Code (01109), County (Hampden), EOHHS Region (EOHHS REGION 1: WESTERN MASS), Primary Address (checked), Address Restriction (checked), Effective From (03/20/2007), and Effective To. A 'Save New Address' button is at the bottom right.

- Enter required information.

Note: In order to be eligible to receive services from the Department of Public Health a client must have at least one Massachusetts residence. Even if the client is homeless, city state, and zip must be entered. Additionally the primary address box must be checked off for a Massachusetts residence. Logic is built into the system so that you don't need to enter an address if the client is homeless, even though it is a required field.

- Click [Save New Address](#).

The Addresses page reappears with the newly entered information.

The screenshot shows the 'Addresses' page for Client #253622 : Carl Sample. It displays a table with one address entry: 'None, Springfield, MA, 01109', which is marked as 'Homeless', 'Restricted', and 'Primary'. The table has columns for Address, Type, Effective From, Effective To, Restricted, and Primary. A 'Display 1 to 1 of 1' link is shown below the table, and an 'Add Address' button is at the bottom right.



Updating Address Information

To update address information:

1. Click **Addresses** from the navigation bar under personal info.

The Update Address page appears.

2. Edit required information.

Note: See handout to review the program-specific intake form for required field information.

3. Click **Save Changes**.

*You are returned to the **Addresses** page.*

Tip: To remove the address entered, click **Delete Address**.



Adding Phone Information

To add phone information:

1. Select **Phones** from the navigation bar.

*The **Phones** page appears.*

Current Location: Client > Client Search > Face Sheet > Phones

Personal Info	Client #253622 : Carl Sample
» Addresses	
» Phones	
» Email Addresses	
» Alternate Names	
» Demographics	

Phones

No Phone Information found. Please [add phone](#)

2. Click the [add phone](#) link.

*The **Add Phone** page appears.*

Current Location: Client > Client Search > Face Sheet > Phones > Add Phone

Personal Info	Client #253622 : Carl Sample
» Addresses	
» Phones	
» Email Addresses	
» Alternate Names	
» Demographics	

Add Phone

*Phone Number Type: Other *Phone Number: 6179885555 Extension:

Primary Street Address: Springfield, MA, 01103

Primary Phone: ☐ Phone Restriction: ☐

*Effective From: 03/20/2007 Effective To:

Comments:

[Save New Phone](#)

3. Enter required information.

4. Click [Save New Phone](#).

*The **Phones** page reappears with the newly entered information.*

Current Location: Client > Client Search > Face Sheet > Phones

Personal Info	Client #253622 : Carl Sample
» Addresses	
» Phones	
» Email Addresses	
» Alternate Names	
» Demographics	

Phones

Phone Number	Extension	Type	Effective From	Effective To	Phone Restriction	Primary Phone
617988-5555		Other	03/20/2007		No	No

| Display 1 to 1 of 1 |

Note: You can add and maintain multiple phone numbers (home, cell phone, etc.).

Tip: To add another phone number, click [Add Phone](#).



Updating Phone Information

To update phone information:

1. Select **Phones** from the navigation bar and click the [phone](#) link in the table.

*The **Update Phone** page appears.*

2. Edit required information.
3. Click **Save Changes**.

*You are returned to the **Phones** page.*

Tip: To remove the phone number entered, click **Delete Phone**.

Adding Email Address Information

To add email address information:

1. Select **Email Addresses** from the navigation bar.

*The **Email Addresses** page appears.*

2. Click the [add email](#) link.



Adding Email Address Information

(continued)

The Add Email Address page appears.

Current Location: Client > Client Search > Face Sheet > Email Addresses > Add Email Address

Client #259780 : Sam Sample

Add Email Address

*Email Address Type:	Primary	*Email Address:	sammy@email.com
Restriction:	<input type="checkbox"/>		
*Effective From:	07/01/2007	Effective To:	
Comments:			

3. Enter required information.

4. Click **Save New Email Address**.

The Email Addresses page reappears with the newly entered information.

Current Location: Client > Client Search > Face Sheet > Email Addresses

Client #259780 : Sam Sample

Email Addresses

Email Address	Type	Effective From	Effective To	Email Restriction
sammy@email.com	Primary	07/01/2007		No

| Display 1 to 1 of 1 |

Updating Email Address Information

To update an email address:

1. Click **Email Addresses** from the navigation bar, and then click the [email address](#) link from the table.

The Update Email Address page appears.

Current Location: Client > Client Search > Face Sheet > Email Addresses > Update Email Address

Client #259780 : Sam Sample

Update Email Address

*Email Address Type:	Primary	*Email Address:	sammy@email.com
Restriction:	<input type="checkbox"/>		
*Effective From:	07/01/2007	Effective To:	
Comments:			

Date Created: 08/20/2007 03:23:39 PM	Created By: cdp
Date Changed: 08/20/2007 03:24:13 PM	Changed By: cdp

Save Changes **Delete Email Address**

2. Edit required information.

3. Click **Save Changes**.

You are returned to the Email Addresses page.

Tip: To remove the email address entered, click

Delete Email Address.



Adding Alternate Name Information

To add alternate name information:

1. Select **Alternate Names** from the navigation bar.

*The **Alternate Names** page appears.*

Current Location: Clients> Client Search > Face Sheet > Alternate Names

Personal Info	Client #259780 : Sam Sample Alternate Names No Alternate Name Information found. Add a new Alternate Name.
» Addresses	
» Phones	
» Email Addresses	
» Alternate Names	
» Demographics	

2. Click the [Add a new alternate Name](#) link.

*The **Add Alternate Name** page appears.*

Current Location: Clients> Client Search > Face Sheet > Alternate Names > Add Alternate Name

Personal Info	Client #259780 : Sam Sample Add Alternate Name *Alternate Name Type: <input type="text" value="Nickname"/> *First Name: <input type="text" value="Sammy"/> Middle Name: <input type="text"/> *Last Name: <input type="text" value="Sample"/> Comments: <input type="text"/> <input type="button" value="Save New Alternate Name"/>
» Addresses	
» Phones	
» Email Addresses	
» Alternate Names	
» Demographics	

3. Enter required information.

4. Click .

*The **Alternate Names** page reappears with the newly entered information.*

Current Location: Clients> Client Search > Face Sheet > Alternate Names

Personal Info	Client #259780 : Sam Sample Alternate Names <table border="1"><thead><tr><th>Alternate Name Type</th><th>First Name</th><th>Middle Name</th><th>Last Name</th></tr></thead><tbody><tr><td>Nickname</td><td>Sammy</td><td></td><td>Sample</td></tr></tbody></table> <p> Display 1 to 1 of 1 </p> <input type="button" value="Add Alternate Name"/>	Alternate Name Type	First Name	Middle Name	Last Name	Nickname	Sammy		Sample
Alternate Name Type		First Name	Middle Name	Last Name					
Nickname		Sammy		Sample					
» Addresses									
» Phones									
» Email Addresses									
» Alternate Names									
» Demographics									



Updating Alternate Name Information

To update alternate name information:

1. Click the [Alternate Name Type](#) link.

*The **Update Alternate Name** page appears.*

Current Location: Clients > Client Search > Face Sheet > Alternate Names > Update Alternate Name

Personal Info	Client #259780 : Sam Sample		
» Addresses	Update Alternate Name		
» Phones	*Alternate Name Type: <input type="text" value="Nickname"/>		
» Email Addresses	*First Name: <input type="text" value="Sammy"/>	Middle Name: <input type="text"/>	*Last Name: <input type="text" value="Sample"/>
» Alternate Names	Comments: <input type="text"/>		
» Demographics	Date Created: 08/20/2007 04:00:24 PM Created By: cdph		
	Date Changed: <input type="text"/> Changed By: <input type="text"/>		
	<input type="button" value="Save Changes"/> <input type="button" value="Delete Alternate Name"/>		

2. Enter required information.

3. Click .

*You are returned to the **Alternate Names** page.*

Tip: To remove the alternate name entered, click

.

Navigation Bar

Use this expanded navigation bar to direct you through adding and updating information.

Manage Client	
» Face Sheet	
» Client Summary	
» Personal Info	Personal Info
» Referrals	» Addresses
» Relations	» Phones
» Insurance	» Email Addresses
» Consents	» Alternate Names
	» Demographics
	Manage Demographics
	» Cultural Background
	» Languages
	» Employment
	» Household Characteristics



Adding Cultural Background information

To add cultural background information.

1. Select **Demographics** from the navigation bar.

Manage Demographics navigation bar appears, with the *Cultural Background* page as the default.

2. Click [Add Cultural Background Information](#) link.

Add Cultural Background page appears.

3. Enter required information.

Note: See handout to review the program-specific intake form for required field information.

4. Click **Save New Cultural Background**.



Updating Cultural Background Information

*The **Update Cultural Background** page appears with the newly entered information.*

Current Location: Client > Client Search > Face Sheet > Cultural Background

Client #253622 : Carl Sample

Update Cultural Background

*Are you Spanish/Hispanic/ Latino? Yes ☐ No ☒

*If no, then what is your ethnicity? Russian

*What is your race? Select one or more.

American Indian/Alaska Native	<input type="checkbox"/>	Asian	<input type="checkbox"/>	Black or African American	<input type="checkbox"/>	Native Hawaiian or other Pacific Islander	<input type="checkbox"/>
White	<input checked="" type="checkbox"/>						
Refused	<input type="checkbox"/>	Unknown	<input type="checkbox"/>	Other	<input type="checkbox"/>		

Country of Birth: Select Below

Are you a U.S. Citizen? Select Below

*In what language do you prefer to read or discuss health related materials? English

Comments:

Date Created: 03/20/2007 03:49:06 PM Created By: adph
Date Changed: 03/20/2007 03:50:57 PM Changed By: adph

Save Changes

To update cultural background information:

1. Edit required information.

Note: See handout to review the program-specific intake form for required field information.

2. Click **Save Changes**.

A message displays, “Cultural Background Updated Successfully”.

Tip: You cannot delete cultural background information.



Adding Languages

To add languages:

1. Select **Languages** from the navigation bar.

*The **Languages** page appears.*

Language	Proficiency	Preferred Language	Date Created	Date Changed
----------	-------------	--------------------	--------------	--------------

No Languages found please add Language

*The **Add Language** page appears.*

Current Location: Client > Client Search > Face Sheet > Languages > Add Language

Client #253622 : Carl Sample

Add Language

*Language: English

Proficiency: Proficient

Preferred Language for Discussion of Health Issues: English

Save New Language

2. Enter the required information.

Note: See handout to review the program-specific intake form for required field information.

3. Click **Save New Language**.

*The **Languages** page reappears with the newly entered information.*



Adding Employment

To add employment status:

1. Select **Employment** from the navigation bar.

*The **Employment** page appears.*

Current Location: Client > Client Search > Face Sheet > Employment

Manage Demographics	Client #253622 : Carl Sample
» Cultural Background	
» Languages	
» Employment	Employment
» Household Characteristics	

Employment Status	Effective From	Effective To
No Employment Record found please add Employment		

Add Employment Activity

2. Click **Add Employment Activity**.

*The **Add Employment** page appears.*

Current Location: Client > Client Search > Face Sheet > Employment > Add Employment

Manage Demographics	Client #253622 : Carl Sample
» Cultural Background	
» Languages	
» Employment	Add Employment
» Household Characteristics	

*Employment Status:	Unemployed - Not Looking for Wo		
*Effective From:	01/12/2007	Effective To:	
Comments:			

Save New Employment

3. Enter required information.

Note: See handout to review the program-specific intake form for required field information.

4. Click **Save New Employment**.

*The **Employment** page appears with the newly entered record.*

Current Location: Client > Client Search > Face Sheet > Employment

Manage Demographics	Client #253622 : Carl Sample
» Cultural Background	
» Languages	
» Employment	Employment
» Household Characteristics	

Employment Status	Effective From	Effective To
Unemployed - Not Looking for Work	01/12/2007	

| Display 1 to 1 of 1 |

Add Employment Activity



Adding Household Characteristics

To add household characteristics:

1. Select **Household Characteristics** from the navigation bar.

The Household Characteristics page appears.

2. Click **Add Household Characteristics**.

The Add Household Characteristics page appears.

Current Location: Client > Client Search > Face Sheet > Household Characteristics > Add Household Characteristics

Client #253622 : Carl Sample

Add Household Characteristics

*Reported Date:	3/1/2007	
*Number of Adults:	1	*Number of Children Living in Household: Note: Children Should Be Under 19
*Family Income:	50	*Income Frequency:
*Source of Income/Support:	Child Support Disability None Other	Received Income Verification:
Marital/Relationship Status:	Divorced	
Comments:		

Save New Household Characteristics

3. Enter required information.

Note: See handout to review the program-specific intake form for required field information.

4. **Save New Household Characteristics**.

The Household Characteristics page reappears with newly entered information.

Current Location: Client > Client Search > Face Sheet > Household Characteristics

Client #253622 : Carl Sample

Household Characteristics

Reported Date	Household Family Size	Annual Income	Marital Relationship Status
03/01/2007	1	\$2,600.00	Divorced

| Display 1 to 1 of 1 |

Add Household Characteristics



Adding Insurance Information

To add insurance information:

1. Return to the **Face Sheet**.
2. Select **Insurance** from the navigation bar.

*The **Insurance** page appears.*

Insurance

No Insurance Information found. Please [add Insurance](#)

3. Click [add Insurance](#) link.

*The **Add Insurance** page appears.*

Current Location: Client > Client Search > Face Sheet > Insurance > Add Insurance

Client #253622 : Carl Sample

Add Insurance

*Insurance Type: Uninsured Primary Insurance: ☐

*Insurance Name: Select Below

Insurance Policy Number: Insurance Group Number:

*Effective From: 03/20/2007 Effective To:

Comments:

Save New Insurance

3. Enter required information.

Note: See handout to review the program-specific intake form for required field information.

4. Click **Save New Insurance**.



Editing Insurance Information

To edit insurance information:

1. Select **Insurance** from the navigation bar.

*The **Insurance** page appears.*

Current Location: Client > Client Search > Face Sheet > Insurance

Manage Client	Client #253622 : Carl Sample								
» Face Sheet	Insurance								
» Client Summary									
» Personal Info									
» Referrals									
» Relations									
» Insurance	<table border="1"> <thead> <tr> <th>Insurance Name</th> <th>Insurance Type</th> <th>Primary Insurance</th> </tr> </thead> <tbody> <tr> <td>No Insurance</td> <td>Uninsured</td> <td>No</td> </tr> </tbody> </table>			Insurance Name	Insurance Type	Primary Insurance	No Insurance	Uninsured	No
Insurance Name	Insurance Type	Primary Insurance							
No Insurance	Uninsured	No							
» Consents	Display 1 to 1 of 1								
» Single Activity	<div>Add Insurance</div>								

2. Click the [Insurance Name](#) link.

*The **Edit Insurance** page appears.*

3. Edit required information.

Note: See handout to review the program-specific intake form for required field information.

4. Click

Save Changes

.

*The **Insurance** page reappears with the newly entered information.*

What is a Consent?

A consent in EIM/ESM differs from the “Consent to Serve” or “Consent to Share Data” that are used.

In EIM/ESM a consent allows you to share client demographic or service information with another provider.

Important: Consents are used to facilitate client referrals.

Adding Consents

If required, follow these steps to add a consent:

1. Select **Consents** from the navigation bar.

*The **Add Consent** page appears.*

2. Enter required information.

3. Click

Save New Consent

.

*The **Consents** page reappears with the newly entered data.*

Note: See *Consent Job Aid* for more detailed information.



Updating Consents

If required, follow these steps to update a consent:

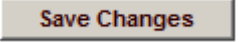
1. Select **Consents** from the navigation bar.

*The **Consents** page appears.*

2. Click the [Consenting Person](#) link.

*The **Update Consent** page appears.*

3. Edit required information.

4. Click .

Adding and Updating Client Information

When the system is unable to determine eligibility because of missing information, it provides links to the forms where information can be entered.

Often, incoming clients do not present with all information needed for eligibility determination and enrollment. If required information (demographic data collection) is missing, the system notifies the provider and supplies links to screens where the required information can be entered. Once the information is entered, the provider screens for eligibility again.

Eligibility Results

More intake information is needed to determine eligibility for this person in the selected program. The following information is required:

[Add Insurance](#)



Editing Client Information From the Face Sheet

Information can also be added and edited from the **Face Sheet**.

When the **Face Sheet** is displayed, the navigation bar provides categories that link to forms where information can be edited.

Manage Client
» Face Sheet
» Client Summary
» Personal Info
» Referrals
» Relations
» Insurance
» Consents

Note: Personal Information and Referrals lead to sub-menus. When you click a category from the navigation bar, a form appears. When you select Personal Info, you can access demographic and household information.

Current Location: Client > Client Search > Face Sheet > Client Summary

Client #253622 : Carl Sample

Client Summary

Primary Address: Springfield, MA 01109

Primary Phone Number:

Prefix: Select Below

*First Name: Carl Middle Name: Last Name: Sample

Suffix: Select Below Highest Grade Completed: Select Below

*Date of Birth: 06/21/1949 Age: 57 Year(s) 8 Month(s) 27 Day(s) *Gender: M-Male

*Social Security Number: 001-34-9999 Refused ☐ Unknown ☐

Date Created: 03/20/2007 02:33:22 PM Created By: adph

Date Changed: Changed By:

Save Changes Delete Client

Add information, and click **Save Changes**.

Tip: Click **Face Sheet** in the breadcrumbs or from the navigation bar to return to the Face Sheet page, where you can screen for eligibility or edit other information.

Current Location: Client > Client Search > Face Sheet >

Manage Client

» Face Sheet

» Client Summary

» Personal Info

Primary Address: 101 Main Street Boston, MA 02118



Editing Client Information From the Face Sheet

(continued)

In ESM, an applicant may have multiple addresses, phone numbers, types of insurance, referrals, relations, etc., on record. Use the following process to add an information set:

1. Select the information category.
2. Click **Add** (Item). (item may be insurance, address, referral, etc.)

The screenshot shows a sidebar titled 'Manage Client' with a list of options: » Face Sheet, » Client Summary, » Personal Info, » Referrals, » Relations, » Insurance (highlighted with a red circle), and » Consents. The main content area is titled 'Insurance' and displays the message: 'No Insurance Information Found. Please [add Insurance](#)' (the link is circled in red).

3. Complete required fields on page.

Note: Required fields are marked with a red asterisk.

4. Click **Save** (Item). (item may be insurance, address, referral, etc.)

The screenshot shows the 'Add Insurance' form. It includes fields for 'Insurance Policy Number', 'Insurance Group Number', 'Effective From' (with a calendar icon), and 'Effective To' (with a calendar icon). There is a red asterisk next to the 'Effective From' field. A 'Comments' field is also present. The 'Save New Insurance' button at the bottom right is circled in red.

Tip: Click Face Sheet in the breadcrumbs or from the navigation bar to return to the applicant's **Face Sheet**.





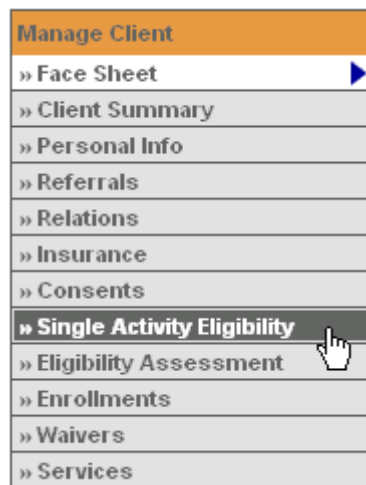
Chapter 6: Enrolling a Client into a Program starts with Eligibility

Eligibility Overview

Before enrolling, the client must be determined eligible for the selected activity.

During this process, ESM compares the client's data to the eligibility rules of the activity and makes a determination.

Currently, you must use the Single Activity Eligibility feature to screen for one program at a time. In future releases, a feature will be added that allows providers to screen for multiple programs at once.



You can begin the screening process by selecting **Single Activity Eligibility** from the navigation bar.

Additional Information

Important Note: When needed, users should refer to program-specific forms. See handout to review the program-specific form for required field information.



The Eligibility Assessment

Some programs will require you to complete an Eligibility Assessment before determining Single Activity Eligibility for the selected activity (program). If you are unsure contact your DPH program

The eligibility assessment asks additional questions that are program-specific. You must complete the assessment before an eligibility determination can be made. If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.

Completing an Eligibility Assessment

To complete an eligibility assessment:

1. Access the applicant's **Face Sheet**.
2. Select **Eligibility Assessment** from the navigation bar.
3. Select Program Name.
4. Click **Complete Assessment**.

Eligibility Assessments		
Select Program Name	Type	Description
<input checked="" type="radio"/> WHN Breast and Cervical Cancer Screening Program	Program	Provides free breast and cervical cancer screening services for uninsured (or underinsured) women in Massachusetts
<input type="radio"/> WHN Heart Disease and Stroke Prevention Program	Program	Cardiovascular screening and risk reduction services
		Review Assessment Complete Assessment

Program specific questions appear.

Note: You should back date according to program policy.

5. Enter required field information.
6. Click **Next page** to answer additional questions.

Note: Consents with wet signatures are still needed.

7. Click **Submit** once the assessment is complete.

*The **Eligibility Assessment** page appears with a message, "The Assessment has been completed successfully!"*

Note: The assessment is required and eligibility cannot be determined without it.



Determining Single Activity Eligibility

Note: The enrollment process begins by determining single activity eligibility and occurs after you add a client.

To access the **Single Activity Eligibility** page:

1. Access the applicant's **Face Sheet**.
2. Select **Single Activity Eligibility** from the navigation bar.
*The **Single Activity Eligibility** page appears.*

Current Location: Client > Client Search > Face Sheet > Single Activity Eligibility

Manage Client

- » Face Sheet
- » Client Summary
- » Personal Info
- » Referrals
- » Relations
- » Insurance
- » Consents
- » **Single Activity Eligibility**
- » Enrollments
- » Services

Client #253622 : Carl Sample

Single Activity Eligibility

Select	Activity Name	Type	Description
<input checked="" type="radio"/>	BSAS Transitional Support Services	Activity	Short term residential services residential support services for clients who need a safe and structured environment to support their recovery process after detoxification. These programs are designed to help those who need services between acute treatment and residential rehabilitation, outpatient or other aftercare.
<input type="radio"/>	School Based Health Centers	Activity	3422 - School-Based Health Centers, funded through the Tobacco Control Program, are comprehensive primary care programs, located within or on the campus of elementary, middle and high schools and linked to other community-based services, that provide developmentally and culturally appropriate health care to students who otherwise may not have access to primary care. With a multi-disciplinary staff, the centers promote positive health behaviors including tobacco prevention and cessation services. The centers increase health knowledge and decision making skills through programs that are coordinated with existing health education activities. The Department funds 21 health providers that operate a total of 31 centers across the state in collaboration with local school systems in high-risk communities. Efforts are also supported to assist the SBHC's in becoming licensed and able to bill third parties for services.
<input type="radio"/>	2201 MRC Vocational Services	Activity	Vocational Services
<input type="radio"/>	2200 MRC Vocational Rehab	Activity	Vocational Rehab
<input type="radio"/>	2205 MRC Extended Employment	Activity	Extended Employment
<input type="radio"/>	2518 Juvenile Defender Boot Camp	Activity	Juvenile Defender Boot Camp
<input type="radio"/>	2503 DY'S Group Care	Activity	Group Care
<input type="radio"/>	2226 MRC SHIP- Residential	Activity	MRC SHIP- Residential
<input type="radio"/>	2216 MRC Independent Living - Res	Activity	Independent Living - Res

[Display 1 to 9 of 9]

Select Activity

3. Select Activity Name

4. Click **Select Activity**.

The page expands.

*Contract: TSS1001 - 2007 - CT **Select Contract**

5. Select a Contract from the pick list.

6. Click **Select Contract**.



Determining Single Activity Eligibility

(continued)

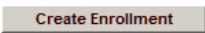
The page expands.

*Contract:	TSS1001 - 2007 - CT	Select Contract
*Enrolling Organization:	DPH Provider 1001	Determine Eligibility

7. Select Enrolling Organization from the pick list.

8. Click  .

The page reappears with Eligibility Results.

Eligibility Results This person is eligible for the selected activity. This person is eligible for 90 days, ending on 06/17/2007. 

Note: This is how you determine eligibility for enrollment.



Results of Eligibility Screening

There are three possible results of eligibility screening:

1. The applicant is determined to be eligible. Click **Create Enrollment** to enroll the applicant.
2. If the applicant is determined to be ineligible. A message appears stating the reason for ineligibility. You may click **Request Waiver** to apply for a waiver. See *Requesting a Waiver* module for detailed information on waivers.

Note: This option may not be available if waivers are not applicable to the program.

3. Additional information is needed to make a determination. In this case, the system provides links to forms where information can be entered. See *Intake* module for more details. Take note if multiple links appear for eligibility results. Once, you have selected one of these links this page will not reappear. Use the left navigation bar to assess the pages needed to complete missing information that is required.

Eligibility Results

More intake information is needed to determine eligibility for this person in the selected program. The following information is required:

[Add Insurance](#) [Add Cultural Background](#) [Add Household Characteristics](#)



Managing the Enrollment Process

Here's a sample of the left navigation bar expanded showing the links available to manage the enrollment process.

Manage Client	
» Face Sheet	
» Client Summary	
» Personal Info	
» Referrals	
» Relations	
» Insurance	
» Consents	
» Single Activity Eligibility	
» Eligibility Assessment	
» Enrollments	▶
» Waivers	
» Services	

Manage Enrollment	
» Enrollment	▶
» Enrollment Assessment	
» Enrollment Preview	
» Enrollment Update	
» Disenrollment Assessment	
» Disenrollment Preview	
» Disenrollment Update	

Accessing the Enrollments Page

Tip: This is a useful way to access and verify enrollment.

To view enrollments:

1. Access the **Face Sheet** page.
2. Click the [Enrollments](#) link from the navigation bar.
*The **Enrollments** page appears.*

Client #253622 : Carl Sample					
Enrollments					
Enrollment ID	ActivityCode	Activity Name	Status	Start Date	End Date
14120	3434	BSAS Transitional Support Services	Active	03/01/2007	05/29/2007

Note: A client may have multiple enrollments for a program, but only one can be **active**.



The Enrollment Assessment

The enrollment assessment asks additional questions that are applicant-specific. You must complete the assessment to complete the enrollment process.

Note: See handout to review the program-specific enrollment form for required field information and associated code sheet as needed.

Completing an Enrollment Assessment

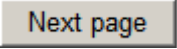
A message will direct you to complete the required enrollment assessment.

To complete an enrollment assessment:

1. Click the [complete enrollment assessment](#) link from bottom right of page.

*The **Enrollment Assessment** page appears.*

2. Enter required field information.

3. Click .

Additional enrollment assessment questions appear.

4. Enter required field information.

The enrollment assessment is complete.

5. Click .

The Enrollment Assessment page appears with a message, "The assessment has been completed successfully."

Enrollment Assessments

The assessment has been completed successfully.

Notes:

- After the enrollment process is completed, the applicant now becomes an active client.
 - If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.
-



Creating an Enrollment

Note: The applicant must be screened through the Single Activity Eligibility process before he or she can be enrolled.

Tip: You can add an enrollment from the Single Activity Eligibility page or select **Enrollment** from the navigation bar.

1. Access the **Single Activity Eligibility** page and determine eligibility.

2. Click **Create Enrollment**.

The Create Enrollment page appears.

3. Enter **Enrollment Period Start Date**. This date must be within the last **365** days.

Note: There is a time period rule associated with individual programs (ranging from seven days to two years).

4. Click **Calculate Timeframe**.

*The **Enrollment Confirmation** block appears.*

5. Click **Confirm Enrollment**.

*The **Update Enrollment** page appears with a message, "Enrollment Added Successfully!!!"*

Optional: Add comments and click **Save Changes**.

To update the enrollment, edit required information and click

Save Changes.

Important Note: Clients may only have one active enrollment per program.



Updating an Enrollment Start Date

If a user was enrolled in a program with the incorrect date, this field is editable from the **Update Enrollment** page.

To update an enrollment date:

1. Access the **Enrollments** page.
2. Click the link for the enrollment you wish to edit.

*The **Update Enrollment** page appears.*

3. Enter the correct Enrollment Start date and click

Save Changes .

*The **Update Enrollment** page appears.*



Notes:



Chapter 7: Adding Services (as needed)

Important Note: Each program policy will determine whether services need to be added, which is based on the contract type, program, program-business requirements, and system functionality.

To record services, users must be in a specific service plan for a specific client. To begin recording services, a client's service plan must first be found or created if one does not exist.

All services entered will be professional services.

Adding Service Plans

To add a service plan:

5. Access the **Clients** page.
*The **Client Search** page appears.*
6. Enter search criteria.
7. Click **Search**.
The Search Results appear below the search criteria.
8. Click the [Client](#) link.
*The **Applicant Face Sheet Summary** page appears.*
9. Click **Services** from the navigation bar.
*The **Service Plans** page appears.*

Service Plan Version:	
Service Coordinator First Name:	
Service Coordinator Last Name:	
Service Plan Org Association:	Select Below
Service Plan Status:	Select Below
First Service Delivery Date:	Effective From Date:
Search Add Plan	

10. Click **Add Plan**.
*The **Add Service Plan** page appears.*

*Service Plan Org Association:	Select Below		
*Effective From:	09/27/2006	Effective To:	
Comments:			
Save New Service Plan			

Note: Search from this page to determine whether a service plan exists for the client.



Adding Service Plans

(continued)

11. Enter plan details, making sure to populate all required fields.

Notes:

- The **Effective From** and **Effective To** date fields are very important. The system verifies that all tasks, services or notes associated with the service plan fall within the effective dates.
- The system does not allow two active service plans of the same type to exist for an individual client.

12. Click .
The Service Plan Summary page appears.

Tip: If a plan was created in error, it can be deleted from this page (assuming all plan contents have been deleted or have an **Error** status).

Service Delivery Data Tips: ACRU

There are four key steps to entering service :

1. Add professional service
2. Complete screening assessment, as required
3. Report results or diagnosis as needed
4. Update service status

A service plan is now prepared to be billed.

Important Note: Refer to the Client Data Entry Transaction Job Aid for program-specific requirements.



Adding Professional Services

Once you have created a service plan, now you can add a professional service:

To add a professional service:

1. Access the **Face Sheet** page.
2. Select **Services** from the navigation bar.
The Service Plan Calendar page appears.
3. Select **Services** from the navigation bar.

Service Plan ID: #523 Version 1 Effective From: 08/29/2006 Effective To:

August 2006

Day	Service Plan Tasks	Case Tasks
1		
2		
3		
4		
5		
6		
7		
8		

View Records
Year: 2006 *
Month: August *
Retrieve

Manage Service Plan
[Add Plan Note](#)
[Add Appointment](#)
[Add Planned Service](#)
[Add Standard Task](#)
[Add Task From Template](#)
[Add Milestone](#)
[Add Professional Service](#)
[Add Institutional Service](#)
[Add Resource](#)
[Add Case](#)

The Service Search page appears.

Service Plan ID: 523 Effective From: 08/29/2006 Effective To:

Service Search

Service Code: Diagnosis Description:
Service From: Service To:
Status:

Search

Search Results

Service Code	Service Date	Service Type	Diagnosis Code	Provider	Status
99214	08/29/2006	professional	784.0 - HEADACHE 787.02- NAUSEA ALONE	Provider Billing Org 9999	Draft
MEH	08/29/2006	professional		Provider Billing Org 9999	Draft
CRRA	08/29/2006	professional		Provider Billing Org 9999	Draft

Display 1 to 3 of 3

Add Professional Service Add Institutional Service

4. Click **Add Professional Service**.



Adding Professional Services

(continued)

The Add Services page appears.

Tip: The [Add Professional Service](#) link may also be accessed from the **Service Plan Calendar** view.

5. Select a **Service Code** from the drop down box.

Tip: If you know the service code, press the Esc key then type the service code in the pick list field.

6. Click .

Additional data entry fields appear.

7. Select a **Rendering Provider** from the drop down box.

8. Click .

Additional data fields appear.

9. Enter service details, making sure to populate all required fields that are indicated by a red asterisk.

10. Click .

*The **Service Summary** page appears with a message stating that the record has been successfully saved.*



Completing a Screening Assessment

Important Note: Each program policy will determine whether services need to be added, which is based on the contract type, program, program-business requirements, and system functionality.


A Screening Assessment may be completed in conjunction with adding a Professional Service. If the assessment is incomplete, the system will require you to return to the initial assessment page to start from the beginning.

Note: Complete Screening Assessment, required only for office visit, level of service and Comprehensive Risk and Resiliency Assessment.

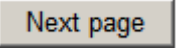
To complete a screening assessment:

1. Access the **Service Summary** page.
2. Select **Screening Assessment** from the navigation bar.


*The **Screening Assessment** page appears.*

3. Click the radio button next to your program-specific assessment.
4. Click .

*An additional **Screening Assessment** page appears.*

5. Click .

*A **Screening Assessment** page appears stating the assessment is complete.*

6. Click .

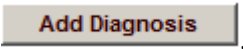
*The **Assessments** page appears with a message, “The assessment has been completed successfully”.*



Adding an ICD-9 Diagnostic Code

To add an ICD – 9 Diagnostic:

1. Access the **Service Summary** page.

2. Click .

*The **Diagnosis Search** page appears.*


3. Enter **ICD-9 Code** in textbox.

Tip: If your search results do not generate the expected results, use a % before a partial ICD-9 Code.

4. Click .

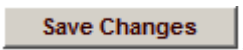
The search results appear below service search.

5. Select the **Diagnosis Code** by clicking the radio button from the search results.

6. Click .

*The **Service Summary** page appears with the **Diagnosis Code** displayed.*

7. Update Status to **Reported**.

8. Click .

The record has been saved.

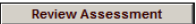
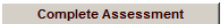
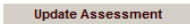
Completing a Service Plan Assessment

Important Note: Each program policy will determine whether services need to be added, which is based on the contract type, program, program-business requirements, and system functionality.

To complete a service plan assessment:

1. Access the **Service Plan Calendar** page.
2. Select **Service Plan Assessments** from the navigation bar.

*The **Service Plan Assessment** page appears.*

Service Plan Assessments	
Select Assessment Name	
<input checked="" type="radio"/> SBHC_Service	
	
	



Completing a Service Plan Assessment

(continued)

3. **Complete Assessment**.

The Service Plan Assessment form appears.

4. Complete assessment.

5. Click **Submit**.

The Service Plan Assessment page reappears with the assessment completed successfully.

6. Update service status as required.

Recording Service Results

Users can associate service results with certain services provided to clients.

To record service results:

1. Access the **Services** page.
2. Select a [Service Code](#) link from the search results.

Service Plan ID: 634	Effective From: 01/25/2008	Effective To: 01/25/2007			
Service Search					
Service Code: <input type="text" value="Select Below"/>	Diagnosis Description: <input type="text"/>				
Service From: <input type="text"/>	Service To: <input type="text"/>				
Status: <input type="text" value="Select Below"/>	<input type="button" value="Search"/>				
Search Results					
Service Code	Service Date	Service Type	Diagnosis Code	Provider	Status
88142	05/02/2006	professional		Hospital	Draft
99243 - C	04/15/2006	professional		Hospital	Draft
57455	04/01/2006	professional		Hospital	Draft
[Display 1 to 3 of 3]					
<input type="button" value="Add Professional Service"/>			<input type="button" value="Add Institutional Service"/>		

The Service Summary page appears.

3. Click **Service Results** from the navigation bar.

The Service Results page appears.

Service Plan ID: 653	Effective From: 05/05/2006	Effective To:		
Service Code: 88142-Cytopathology, cervical/vaginal, preservative fluid, auto thin layer prep; manual screen	Type: professional			
Service Results				
Date Received	Service Result Type	Reporting System	Result	Status
<input type="button" value="Add Service Result"/>				

4. Click **Add Service Result**.



Recording Service Results

(continued)

The Add Service Result page appears.

Service Plan ID:	653	Effective From:	05/05/2006	Effective To:	
Service Code:	88142-Cytopathology, cervical/vaginal, preservative fluid, auto thin layer prep; manual screen			Type:	Professional
Add Service Result					
Service Result Type:	Pap				
*Reporting System/Units:	Bethesda2001			<input type="button" value="Select"/>	

5. Select **Reporting System/Units**

6. Click **Select**.

The Add Service Result page appears.

Service Plan ID:	653	Effective From:	05/05/2006	Effective To:	
Service Code:	88142-Cytopathology, cervical/vaginal, preservative fluid, auto thin layer prep; manual screen			Type:	Professional
Add Service Result					
Service Result Type:	Pap				
*Reporting System/Units:	Bethesda01				
*Result:	21-Negative for Intraepithelial Lesion or Malignancy				
*Specimen Adequacy:	3-Unsatisfactory				
Date Received:	<input type="text"/>	<input type="button" value="Calendar"/>		*Status:	02-Further screen
Recommended Follow Up Months:	<input type="text"/>				
Comments:	<input type="text"/> <input type="button" value="Up"/> <input type="button" value="Down"/>				
<input type="button" value="Save New Service Result"/>					

7. Enter service result details, populate all required fields.

8. Click **Save New Service Result**.

The Service Results page appears displaying the new entry.



Completing a Final Diagnostic Assessment

For some programs, such as Women's Health Network, you may be required to complete a Final Diagnosis Assessment. This assessment needs to be completed at the close of a diagnostic work-up.

To complete a final diagnostic assessment:

1. Access the **Add Associated Service** page.
2. Click **Final Diagnosis** from the navigation bar.
*The **Final Diagnosis** page appears.*

Determination Date	Diagnosis Type	Primary Code	Status
01/26/2006	Cervical	05 - CIN II/Severe dysplasia/cancer in situ (biopsy required)	Complete

[Display 1 to 1 of 1](#) [Add Final Diagnosis](#)

3. Click the [Determination Date](#) link.
*The **Update Final Diagnosis** page appears.*

Update Final Diagnosis

Diagnosis Type cannot be changed for a Final Diagnosis that has one or more Associated Services.

Diagnosis Type:

Primary Diagnosis Code:

Date of Diagnosis Determination:

Status:

Recommended Follow Up Months:

Recommended Follow Up Date:

Clinical Notes Related to Diagnosis:

[Save Changes](#) [Delete Final Diagnosis](#)

4. Click **Assessment** from the navigation bar.
*The **Diagnosis Assessments** page appears.*

Diagnosis Assessments

Select Assessment Name:

☐ Diagnostic_Treat

[Review Assessment](#) [Complete Assessment](#)

5. Click [Complete Assessment](#).

Diagnosis Assessment

Client Last Name: Austen Client First Name: Jane Client ID: 833

To complete the assessment for this client, press 'Next':

[Next page](#)

0% complete



Completing a Final Diagnostic Assessment

(continued)

The **Diagnosis Assessment** page appears and the diagnosis assessment begins.

The screenshot shows the 'Diagnosis Assessment' page. On the left is a sidebar with a tree view containing 'Summary', 'Associated Services', and 'Assessment', with 'Assessment' selected. The main content area displays client information: 'Client Last Name: Austin', 'Client First Name: Jane', and 'Client ID: 833'. Below this, it says 'To complete the assessment for this client, press Next.' and features a 'Next page' button. At the bottom, a progress bar indicates '0% complete'.

Tip: Notice the **% Complete** bar at the bottom of the page. Once started, work must be completed. A partially completed assessment cannot be saved.

6. Click **Next page**.

The **Diagnosis Assessment** is continued.

The screenshot shows the 'Diagnosis Assessment' page at a later stage. The sidebar remains the same. The main content area now includes a section titled 'WHH Cervical Diagnostic and Treatment Assessment' with the prompt 'Date the information was collected:' and a text box containing '1/31/06'. Below this, it asks 'Staff who collected the information:' with fields for 'First name:' (containing 'sally') and 'Last Name:' (containing 'staff'). There are 'Previous page' and 'Next page' buttons. The progress bar at the bottom now shows '53% complete'.

7. Enter information in the **Date the information was collected** and the **Staff who collected the information** fields.

A series of pages appear for completion. The pages that appear depend on the values entered on previous pages.

8. Enter information to complete the questions regarding the client's particular circumstances.

9. Click **Submit**.

The **Diagnosis Assessments** page appears with the message, "The Assessment has been completed successfully."



Adding a Final Diagnosis

Users may also maintain final diagnosis details for a client.

To add a final diagnosis:

1. Access the **Service Results** page.
2. Click the [Services](#) link in the breadcrumbs.
3. Click **Final Diagnosis** from the navigation bar.

*The **Final Diagnosis** page appears.*

Determination Date	Diagnosis Type	Primary Code	Status
01/13/2006	Cervical	-	Lost to Follow-up
01/17/2006	Breast	-	Lost to Follow-up

[Display 1 to 2 of 2]

Add Final Diagnosis

Note: Diagnostic services that are recorded without an associated final diagnosis appear on audit reports. Such diagnostic services appear open to the CDC. Completion of final diagnosis information is critical.

4. Click **Add Final Diagnosis**.

*The **Add Final Diagnosis** page appears.*

Service Plan ID: 502 Effective From: 01/07/2006 Effective To:

Add Final Diagnosis

*Diagnosis Type: Breast Select Diagnosis Type

Primary Diagnosis Code: 1 - Breast cancer identified

Date of Diagnosis Determination: 01/19/2006 Recommended Follow Up Months:

Status: Select Below

Save New Final Diagnosis

5. Select a **Diagnosis Type**.
6. Complete the optional fields, as needed.
7. Click **Save New Final Diagnosis**.

*The **Final Diagnosis** page appears with new entry displayed.*

Determination Date	Diagnosis Type	Primary Code	Status
05/05/2006	Cervical	01 - Normal benign reaction	Complete
-	Cervical	-	-
-	Cervical	-	-

[Display 1 to 3 of 3]



Associating Services to a Final Diagnosis

Users are required to associate service(s) to a Final Diagnosis.

To associate service to a final diagnosis:

1. Access the **Final Diagnosis** page.
2. Click the [Determination Date](#) link.
3. Click **Associated Services** on the navigation bar.
The Associated Service page appears.
4. Click **Add Associated Service**.
The Add Associated Service page appears.

The screenshot shows the 'Add Associated Service' page. On the left is a navigation menu with 'Summary' and 'Associated Services' (selected). The main content area has a header with 'Service Plan ID: 562', 'Effective From: 01/07/2006', and 'Effective To:'. Below this is a 'Diagnosis Date:' field, followed by 'Primary Diagnosis Code: 1' and 'Secondary Diagnosis Code:'. The main section is titled 'Add Associated Service' and contains a table with columns: 'Select', 'Service Code', 'Service Date', 'Service Type', 'Provider', and 'Status'. One row is visible with a radio button in the 'Select' column, '19000 - Puncture aspiration, cyst, breast' in 'Service Code', '01/07/2006' in 'Service Date', 'professional' in 'Service Type', an empty 'Provider' field, and 'Claimed' in 'Status'. Below the table is a link '[Display 1 to 1 of 1]' and an 'Add Association' button at the bottom right.



Chapter 8: Disenrollment

Disenrollment Overview

A client is automatically enrolled for a set period of time, which is determined by the DPH program. It's during that time period, however, the client may drop, relapse, complete the program or become ineligible due to changes in income, insurance, etc. When that happens, the enrollment should be *closed*.

Additional Information

Important Note: When needed, users should refer to program-specific forms. See handouts to review the program-specific form for required field information.

Disenrolling a Client or Updating Enrollment Status

To close an enrollment:

4. Access the **Enrollments** page.
5. Click the link for the enrollment you wish to close.

*The **Update Enrollment** page appears.*

Update Enrollment			
Enrollment ID:	621	Enrollment Status:	Closed
Medical Record Number:	242630	Disenrollment Reason:	Became income ineligible
Enrollment Start Date:	08/25/2006	Enrollment End Date:	08/24/2007
Enrolling Corporation:	Provider Billing Org 9999		
Enrolling Facility:			
Comments:			
Date Created:	08/29/2006 10:48:27 AM	Created By:	bbillings
Date Changed:		Changed By:	
Save Changes			

6. Edit the necessary information.
 - Mark enrollment status closed.
 - Select reason for disenrollment.
 - Enter Enrollment End Date
 - Optional: enter comments.

Important Note: Enrollment End date information can only be entered when an enrollment is marked as “**closed**.”



7. Click .

*The **Update Enrollment** page appears.*



The Disenrollment Assessment

You can manage the following disenrollment activities from the navigation bar:

- Disenrollment Assessment
- Disenrollment Preview (including print assessment)
- Disenrollment Update



Note: See handout to review the program-specific disenrollment form for required field information and associated code sheet as needed.

Completing a Disenrollment Assessment

To complete a disenrollment assessment:

1. Select **Disenrollment Assessment** from the navigation bar
*The **Disenrollment Assessment** page appears.*

2. Enter required field information.

3. Click .

Additional disenrollment assessment questions appear.

4. Enter required field information.

The enrollment assessment is complete.

5. Click .

The Disenrollment Assessment page appears with a message, "The assessment has been completed successfully."



Re-enrolling a Client

To re-enroll a client:

1. Check basic Demographic information (address, phone, etc.).
2. Update Demographic information, as needed.
3. Enter Single Eligibility Activity.
4. Create Enrollment.
5. Enter Enrollment Assessment.

Note: When performing steps 3 - 5, you are repeating the initial enrollment process.



Chapter 9: Managing Service Plans (as needed)

Managing Service Plans: Assigned Resources

Important Note: Each program policy will determine whether services need to be added, which is based on the contract type, program, program-business requirements, and system functionality.

Authorized users can maintain resources for a client's service plan. The resources assigned to the client's cycle of care can then be referenced as part of a particular task, appointment or scheduled procedure.

To add an assigned resource:

1. Access the **Service Plan Calendar** page.
2. Click **Assigned Resources** on the navigation bar.
The Assigned Resources page appears.
3. Click [Add Resource](#) link.
The Add Assigned Resource page appears.

Select	Name	Organization Legal Name	Default Staff Type	Status
<input type="radio"/>	chris billings	Provider Billing Org 9999		Active
<input type="radio"/>	ann billings	Provider Billing Org 9999		Active
<input type="radio"/>	Bob Billings	Provider Billing Org 9999		Active

Note: A resource search may be conducted based on the resource's last name, specific sub-organization, and staff group or staff type.

4. Select the desired resource in the **Search Results**.
5. Select the **Service Coordinator** check box to identify the resource as a Service Coordinator, if desired.
6. Click **Save New Assigned Resource**.
The Assigned Resources page appears with the new resource.



Notes:



Chapter 10: Working with Case Management (as needed)

Case Management Overview

Authorized users can maintain resources for a client's case management. The resources assigned to the client's cycle of care can then be referenced as part of a particular task, appointment or scheduled procedure.

This is based on program requirements when abnormal results require case management.

Once a case is entered, you can insert case notes as well as schedule tasks associated with the management of each case.

Case management consolidates the collection and access to real-time client-level data sharing across all authorized staff involved in patient care.

Note: Service Plans, Case Notes, and Tasks are used for client care. Only those providing case management should be using Case Notes and Tasks.

Use case management to:

- Add a case
- Add a case note
- Add a task:
 - Add appointment
 - Add planned service
 - Add template
 - Add milestone

Tip: You can access this functionality using the left navigation bar and selecting Cases or from the Manage Service Plan navigation box located on the Service Plan Calendar page.

Day	Service Plan Tasks	Case Tasks
1		
2	00142 - professional	
3		
4		
5		
6		
7		Case Note - 05/07/2006
8		



Adding a Case

To add a case:

1. Access the **Service Plan Calendar**.
2. Select **Cases** from the navigation bar.

The Cases page appears.

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases

Service Plan	Client #253622 : Carla Sample
» Service Plan Calendar	
» Service Plan Summary	
» Plan Notes	
» Tasks	
» Assigned Resources	
» Cases	
» Services	
» Final Diagnoses	
» Service Plan Assessments	

Service Plan ID:	#634 Version 2	Effective From:	01/25/2006	Effective To:	01/25/2007
------------------	----------------	-----------------	------------	---------------	------------

Cases

No Case Information found. Please [add case](#)

3. Click [Add Case](#) link.

The Add Case page appears.

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Add Case

Service Plan	Client #253622 : Carla Sample
» Service Plan Calendar	
» Service Plan Summary	
» Plan Notes	
» Tasks	
» Assigned Resources	
» Cases	
» Services	
» Final Diagnoses	
» Service Plan Assessments	

Service Plan ID:	#634 Version 2	Effective From:	01/25/2006	Effective To:	01/25/2007
------------------	----------------	-----------------	------------	---------------	------------

Add Case

Enrolling Organization: Hospital

*Case Manager: M

*Issue Category: Breast

Date Entered at Diagnostic Level: []

*Enter Either CM Initiation Date or Refusal Date

*CM Initiation Date: 05/06/2006

Refusal Date: []

[Save New Case](#)

4. Enter required information.
5. Click [Save New Case](#).



Adding a Case

continued

The Case Summary page appears with the case added successfully.

Current Location: Client > [Client Search](#) > [Face Sheet](#) > [Service Plans](#) > [Service Plan Calendar](#) > [Cases](#) > Case Summary

Case

» Case Summary

» Case Notes

» Tasks

» Case Assessment

Client #253622 : Carla Sample

Service Plan ID: #634 Version 2

Effective From: 01/25/2006

Effective To: 01/25/2007

Case ID: 363

Case Summary

Case Added Successfully

Status: Active

Enrolling Organization: Hospital

*Case Manager: M

*Issue Category: Breast

Date Entered at Diagnostic Level:

CM Initiation/Refusal Date: 05/06/2006

*Date Type: Enrollment ☒ Refusal ☐

Discharge Date:

Discharge Reason: Select Below

Save Changes

Delete Case



Adding Case Notes

To add a case note:

1. Access the **Case Summary** page.
2. Select **Case Notes** from the navigation box.

The Case Notes page appears.

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Case Summary > Case Notes

Case	Client #253622 : Carla Sample		
» Case Summary			
» Case Notes			
» Tasks			
» Case Assessment			

Service Plan ID: #634 Version 2	Effective From: 01/25/2006	Effective To: 01/25/2007
Case ID: 363		

Case Notes

No Case Note Information found. Please [add case note](#)

3. Click [Add Case Note](#) link.

The Add Case Note page appears.

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Case Summary > Case Notes > Add Case Note

Case	Client #253622 : Carla Sample		
» Case Summary			
» Case Notes			
» Tasks			
» Case Assessment			

Service Plan ID: #634 Version 2	Effective From: 01/25/2006	Effective To: 01/25/2007
Case ID: 363		

Add Case Note

*Note:

[Save New Case Note](#)

4. Type or paste information in textbox.

5. Click [Save New Case Note](#).

The Case Notes page appears with the note record displayed.

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Case Summary > Case Notes

Case	Client #253622 : Carla Sample		
» Case Summary			
» Case Notes			
» Tasks			
» Case Assessment			

Service Plan ID: #634 Version 2	Effective From: 01/25/2006	Effective To: 01/25/2007
Case ID: 365		

Case Notes

Case Note ID	Note	Date Recorded	Recorded By	Additional Comments
320	Will follow up with client before next scheduled appointment.	05/07/2006	pmuserfive	0

[Display 1 to 1 of 1](#)

[Add Case Note](#)



Adding a Task

To add a task:

1. Access the **Case Summary** page.

*The **Tasks** page appears.*

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Case Summary > Tasks

Case

- » Case Summary
- » Case Notes
- » Tasks
- » Case Assessment

Client #253622 : Carla Sample

Service Plan ID: #834 Version 2 Effective From: 01/25/2006 Effective To: 01/25/2007

Case ID: 365

Tasks

Date Scheduled	Task Title	Task Type	Status
----------------	------------	-----------	--------

[Add Appointment](#) [Add Planned Service](#) [Add Standard Task](#) [Add Template](#) [Add Milestone](#)

2. Select a task.

*The appropriate **Add Task** page appears.*

Current Location: Client > Client Search > Face Sheet > Service Plans > Service Plan Calendar > Cases > Case Summary > Tasks > Add Task

Case

- » Case Summary
- » Case Notes
- » Tasks
- » Case Assessment

Client #253622 : Carla Sample

Service Plan ID: #834 Version 2 Effective From: 01/25/2006 Effective To: 01/25/2007

Case ID: 365

Add Appointment Task

*Organization Short Name: [Select Organization](#)

To add appointment task:

3. Select **organization short name**.
4. Click **Select Organization**.

The page reappears with additional fields.

Add Appointment Task

*Organization Short Name: [Select Organization](#)

*Location: [Select Location](#)

*Staff Member: [Select Below](#)

*Task Title:

*Priority: [Select Below](#)

*Task Status: [Scheduled](#)

*Date Scheduled: [10:00](#) [AM](#) [PM](#)

Comments:

Recurring Task

Recurring Task: ☐

Duration: [Select Below](#)

Pattern: ☐ By Date of month ☐ By Day of week

Day of Week: ☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Day of Month: [Select Below](#)



Adding a Task

continued

5. Enter information for required fields.

Tip: If the task is ongoing, use the recurring task fields to document this information,

6. Click **Save New Task**.

The Task page appears with the task added successfully.

Client #253622 : Carla Sample			
Service Plan ID: #634 Version 2	Effective From: 01/25/2006	Effective To: 01/25/2007	
Case ID: 363			
Tasks			
Task added Successfully.			
Date Scheduled	Task Title	Task Type	Status
05/10/2006	appointment	Appointment	Scheduled
Display 1 to 1 of 1			



Chapter 11: Requesting a Waiver (as needed)

Waivers Overview

When a client is ineligible for the program, the authorized user can request a program eligibility waiver for a client.

The waiver is approved or denied by the *Department of Public Health (DPH)*, usually within a few days.

If the waiver is approved, the system allows the applicant to be enrolled.

Accessing the Waiver Request Page

The **Waiver Request** page can only be accessed when an applicant is determined ineligible through Single Program Eligibility.

To access the **Waiver Request** page:

1. Access the **Face Sheet** page.
2. Click **Single Program Eligibility** in the navigation bar.
3. Determine that the individual is not eligible for the program.
(the waiver cannot be requested unless the applicant is ineligible)

Eligibility Results
This person is not eligible for the selected program.
1
WHH Gender requirements were not met.

Request Waiver

4. Click

Request Waiver

*The **Waiver Request** block appears at the bottom of the page.*
-



Requesting a Waiver

To request a waiver:

Waiver Request	
Person Name:	
Birth Date:	01/05/1950
Program Name:	WHN Breast and Cervical Cancer Screening Program
Status:	Requested
Reason for Waiver:	1 WHN Gender requirements were not met.
Requestor Name:	steps
Effective From:	09/12/2005
Effective To:	
Comments:	
Request Waiver	

1. In the Waiver Request block, enter waiver details, ensuring all required fields are populated.

Note: In the **Effective From** and **Effective To** fields, enter dates approximately a month apart. This is the time period in which you can enroll the applicant once the waiver is approved.

2. Click [Request Waiver](#)

A message confirms that the waiver request has been submitted.

Important: In the comments section, enter reason for waiver request. A decision will be based upon rationale inserted in comments section.



Viewing Waivers

Once you submit a waiver, check the system regularly for a response. Waivers should be approved or denied within 3 days, most within 24 hours.

To view or update the status of existing waivers:

1. Access the **Face Sheet** page.
2. Click **Waivers** in the navigation bar.
*The **Waivers** page appears; the waiver is listed as submitted, approved or denied.*
3. Click the [Program](#) link to view details.

» Face Sheet

» Client Summary

» Personal Info

» Referrals

» Relations

» Insurance

» Consents

» Single Program Eligibility

» Eligibility Assessment

» Examinations

» **Waivers**

» Services

Waivers

Program	Status	Requestor Name	Effective From	Effective To
WHN Breast and Cervical Cancer Screening Program	Approved	steps	09/12/2005	12/01/2005

Display 1 to 1 of 1



Enrolling an Applicant With an Approved Waiver

To enroll the applicant, you must go through the Single Program Eligibility screening again. (See module 6).

The system determines the applicant ineligible; however, since there is an approved waiver, an enrollment button appears and allows the applicant to be enrolled.

Single Program Eligibility

Select	Program Name	Type	Description
<input type="radio"/>	WHN Breast and Cervical Cancer Screening Program	Program	Provides free breast and cervical cancer screening services for uninsured (or underinsured) women in Massachusetts
<input type="radio"/>	WHN Heart Disease and Stroke Prevention Program	Program	Cardiovascular screening and risk reduction services

Select Program

Display 1 to 2 of 2 |

*Contract:

Select Contract

*Enrolling Organization:

Determine Eligibility

Eligibility Results

This person is not eligible for the selected program.

1

WHN Gender requirements were not met.

Person Waiver Request Approved.

Create Enrollment



Chapter 12: Working with Prior Authorizations (as needed)

Introduction

Authorizations are a function of treatment planning, case management and service delivery in the ESM system.

Business Process Overview

An authorization is the process by which providers request permission to provide a particular service or services. Not all services require authorizations. Providers should submit authorizations prior to service delivery. Previously, requests had been submitted in many forms: telephone, fax, paper and electronically. *EIM/ESM* will streamline these processes accommodating a paperless transmission.

Designated staff members from a service provider organization have the ability to create authorizations for a specific client, identify the status of each authorization, and review the amount of services for each authorization. Designated staff in the program office have the ability to review authorization requests that have been received from providers associated with their programs and respond to such requests.

Authorization Request Statuses

The following table lists the status states that are posted during an authorization request:

Status	Definition
Draft	Initial creation status
Submitted	Request has been sent for authorization
Hold	Status of authorization while awaiting an agency-indicated response
Approved	Authorization request approved by reviewer Once approved, services are ready to be delivered and billed on.
Rejected	Authorization request rejected by reviewer



Notes:



Chapter 13: Reporting

Introduction

Typically, reports are generated by an authorized user who chooses report content and format as part of submitting a reporting request.

Key Terms

The following terms will help in understanding how reports function:

- **Service Management Reports:**
Reports related to ESM functionality
- **Report Selection Criteria:**
Parameters/filters a provider enters when requesting a report
- **Report Output Format:**
Reports can be created as Excel or PDF files
- **Report Frequency:**
Reports in EIM/ESM are scheduled on-demand

Accessing the Reporting Feature

To access the reporting feature of EIM/ESM: Select the **Reports** module. *A list of Service Management reports appears.*

The screenshot shows the EIM/ESM web interface. The top navigation bar includes links for Home, Clients, Case Management, Billing, Contracts, Credentials, **Report** (circled in red), Help, and Logout. Below the navigation bar, the 'Current Location' is 'Reports > Reports'. The main content area is titled 'Reports' and contains two sections: 'ESM Reports' and 'System Assurance Reports'. The 'ESM Reports' section lists various report types, including Client Enrollment Status, Client Enrollment Status (DI), Client Extract, Client History - BCC, Client History - HDSP, Clients with Incomplete Data, Clients with Incomplete Data (DI), Clients With Abnormal Results, Common Intake Applicants, Fund Allocations by Service and Age Category, and WHN MDE Audit Report. The 'System Assurance Reports' section is currently empty. A 'Note' box at the bottom states: 'The reports are generated in Adobe PDF and Microsoft Excel format. Click here to download free Acrobat Reader to view PDF files. Click here to download Microsoft's free Excel Viewer to view Excel file.'

Note: Access to reports is based on user security roles. Your page may look slightly different.



ESM Reports Catalog

The table below lists the reports available in EIM/ESM. Depending on your user security role, not all reports listed may be relevant to the program you are working with.

Report Name	Purpose
Aggregate Diagnosis Report (SBHC)	Provides a listing of the top 50 diagnoses made at a given site in a given period.
Aggregate Enrollment Status Report (SBHC)	Provides a copy of the new unique client enrollments per site per month for the selected year.
Aggregate Service Report (SBHC)	Provides a listing of the top 50 services delivered at a given site in a given period.
Client Extract Report	Provides contact and demographic information for a selected client population for the purpose of contacting the client.
Client Enrollment Status Report	Provides a list of clients enrolled within some specified timeframe. Can be used to identify clients that have been enrolled that have not received services, to confirm enrollments, to identify clients that have disenrolled and referred to another program (activity) and to assess organization capacity usage.
Client Enrollment Status Report - DI (BSAS)	Provides a list of clients enrolled within some specified timeframe. This version of the report without client identification information is to be used by BSAS agency users.
Clients with Abnormal Results	Identifies clients with abnormal test results that require monitoring or follow-up.
Client with Incomplete Data	Provides a list of active clients missing information. The purpose of this report is to provide a summary report of clients where data is missing such as missing Assessments (input parameters might include: Program/Activity and Assessment Name – multi-select).



ESM Reports Catalog

(continued)

Report Name	Purpose
Client With Incomplete Data - DI (BSAS)	Provides a list of active clients that are missing information. This version of the report without client identification information is to be used by BSAS agency users.
Common Intake Applicant Report	Identifies clients that have been processed through common intake. Provides a list of applicants processed through common intake for a specific program.
Client History - BCC	Shows the full clinical history of services received and paid, funding sources, results, diagnosis, and treatment information for selected client/s. This report format will be used with site visit criteria to generate site visit client history as well.
Client History - HDSPP	Shows the full clinical history of services received and paid, funding sources, results, diagnosis, and treatment information for selected client/s. This report format will be used with Site visit criteria to generate site visit client history as well.
Diagnosis Report (SBHC)	Provides a copy of the enrolled individuals associated with a selected diagnosis.
Encounter Status Report (SBHC)	Provides a copy of the unique daily encounters per site for each month of the selected year.
Fund Allocations by Service and Age Category (Fund Allocation Report)	Analyzes fund allocations by service and age categories. The CDC requires monitoring performance against guidelines based on Age and Service Category.
Services Not Associated With a Claim or Have an Error	Provides a list of services that are in draft or ready state that have not been associated with a claim or services that have been rejected.





Entering Report Criteria


Criteria selection tailors report results. By entering criteria, a user can determine the details and grouping of the report data. Criteria include dates, activity, locations, and contract numbers.

To enter criteria and run a report:

1. Select the **Reports** module.
A list of Service Management reports appear.
2. Click the [name of the individual report](#) link.
*A **Report Criteria** page appears.*

Note: The **Report Criteria** page will differ depending upon the specific report being requested.

3. Enter criteria.
4. Select a **Report Format** (*PDF is the default*). Report criteria are not always printed on reports. Users may find it helpful to record criteria manually.
5. Click .
The report opens in a new window.
6. Click **File** from the menu at the top of the page, select **Save As** for *Excel file* or **Save a Copy** for *PDF*.
7. Navigate to the desired location; enter a title in the **File Name** field and click .

Tip: Click  to clear out report criteria entered.



Trouble - Shooting

Listed below are some of the most commonly asked questions about running reports in EIM/ESM.

Problem	Possible solutions
Why am I not getting the results I expected?	<ul style="list-style-type: none">• Double-check that criteria filters are correct• Consider user security
Why doesn't this match my legacy reports?	<ul style="list-style-type: none">• Double-check that criteria filters are correct
Why does my computer stall when I try to run certain reports?	<ul style="list-style-type: none">• Check your report parameters (dates, contract numbers etc). It may be the parameters you specified returned no results. Sometimes, when the system is trying to return an 'empty' report, it stalls. This does not happen every time when there are no results returned. If the system is unresponsive after five minutes, close any unresponsive windows.• Reports do not run directly off the EIM/ESM service. They run from a separate database that is regularly refreshed with EIM/ESM information. The time delay for this replication is about 20 minutes, so if you just entered information into EIM/ESM, you would not be able to report on it until about 20 minutes later.
When I alert customer service about reports not running or taking too long to run, what information should I provide?	<ul style="list-style-type: none">• Make a note of the report name and the date and time you attempted to run it.• Provide the input parameters you used (contract number, vendor name, etc.) and how long you waited before the report timed out or you halted your efforts. If an error message appears on the screen, make a note of that as well.



Notes: